

HOW TO... GROUP DATA IN EXCEL

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HOW TO... Group data in Excel

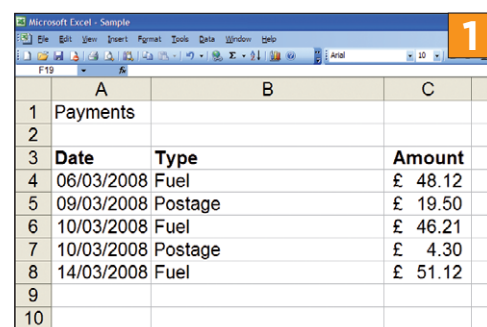
An Excel spreadsheet can be overwhelming to the beginner, and you don't always want to see a thousand data rows. Rod Lawton explains how you can view just summaries and the last line

Excel can group rows or columns of data to create an outline structure that is similar to the Outline feature in Word. While Word uses outlining to display headings and not the whole document, Excel lets you view summarised details such as totals, rather than overpowering you with a screen full of raw data.

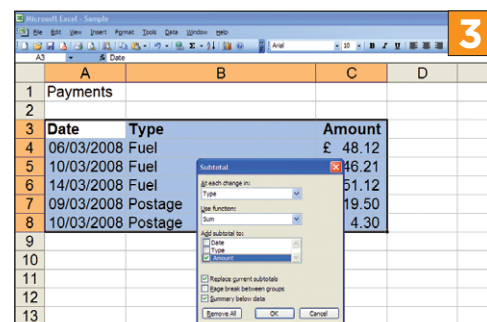
This is a powerful and effective tool, but it can be confusing if you don't know how it works. Excel might be clever at crunching numbers, but it's not very good at explaining what it's doing. In this walkthrough, we will show you a very simple example of a situation where grouping might prove useful. Here we will cover Excel 2003 and 2007.

In our example, we have a list of payments that occur over a number of dates and are split into two types: Fuel and Postage. We want to be able to see the total amount spent in these two categories, without seeing every single transaction. We also want to be able to examine these transactions if we need to, in case there's an anomaly we need to investigate.

1 Start off with a simple list of transactions, entered in chronological order under three column headings: Date, Type and Amount. There's no gap between the column headings and the data, or between any of the rows of data. It's very important not to have gaps in the data if you want sorting, subtotals and grouping to work properly. In other words, your data must be contiguous.



	A	B	C
1	Payments		
2			
3	Date	Type	Amount
4	06/03/2008	Fuel	£ 48.12
5	09/03/2008	Postage	£ 19.50
6	10/03/2008	Fuel	£ 46.21
7	10/03/2008	Postage	£ 4.30
8	14/03/2008	Fuel	£ 51.12
9			
10			

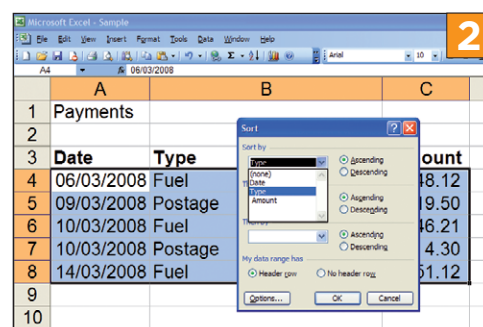


	A	B	C	D
1	Payments			
2				
3	Date	Type	Amount	
4	06/03/2008	Fuel	£ 48.12	
5	10/03/2008	Fuel	£ 46.21	
6	14/03/2008	Fuel	£ 51.12	
7	09/03/2008	Postage	£ 19.50	
8	10/03/2008	Postage	£ 4.30	
9				
10				
11				
12				
13				

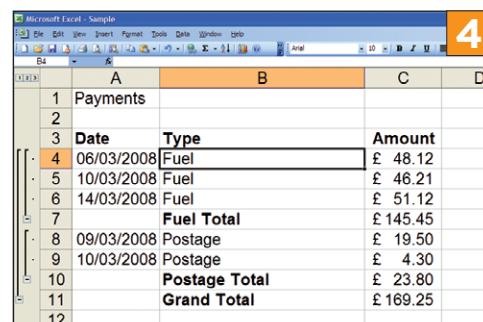
2 There are two steps when grouping data and creating subtotals. First, select any cell in the data and then sort it using the Sort option in the Data menu. You can also use the Sort button in the Data tab or the Sort & Filter group in Excel 2007. Sort the data according to the property you want to add up into a subtotal. We want a subtotal for each transaction type, so choose Type from the first 'Sort by' field. Excel lists Type and the other sorting choices from the column headings at the top of the data.

3 Once the data is sorted by Type, open the Data menu again and choose the Subtotals option. In Excel 2007 the Subtotal button is in the Outline group, which is in the Data tab. We want our data subtotaled by Type. Excel doesn't offer to create subtotals of items according to your sort criteria automatically, so it's up to you to make sure they match up. If you don't, you'll get a jumble of data that means nothing.

4 Excel automatically groups the data into an outline, which can be expanded or collapsed using the buttons labelled 1, 2 and 3. These appear in the top left part of the worksheet window. Button number 3 will show all three outline levels, as shown below. Each transaction is listed, as are subtotals for each payment type and a grand total. The second button will collapse the outline to show the subtotals and grand total, while the first button will collapse the data further to show just the grand total.



	A	B	C
1	Payments		
2			
3	Date	Type	Amount
4	06/03/2008	Fuel	£ 48.12
5	09/03/2008	Postage	£ 19.50
6	10/03/2008	Fuel	£ 46.21
7	10/03/2008	Postage	£ 4.30
8	14/03/2008	Fuel	£ 51.12
9			
10			



	A	B	C	D
1	Payments			
2				
3	Date	Type	Amount	
4	06/03/2008	Fuel	£ 48.12	
5	10/03/2008	Fuel	£ 46.21	
6	14/03/2008	Fuel	£ 51.12	
7		Fuel Total	£ 145.45	
8	09/03/2008	Postage	£ 19.50	
9	10/03/2008	Postage	£ 4.30	
10		Postage Total	£ 23.80	
11		Grand Total	£ 169.25	
12				